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Environmental Restoration Project
Desk Instruction

for:

Formatting Electronic Records for Web Publication



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Revision Log

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Formatting Electronic Records for Web Publication

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Formatting Electronic Records for Web Publication

1.0 PURPOSE

This Desk Instruction (DI) states the responsibilities and describes the process for formatting electronic records in order to publish records on ER Project web pages.

2.0 SCOPE

This DI is a guidance document, and the Document Control Coordinator (DCC) implements this DI when electronic records require ER Project, web publication.

3.0 REFERENCES

The DCC becomes familiar with the contents of the following documents located at http://erinternal.lanl.gov/home_links/Library_proc.shtml to properly implement this DI.

- LANL-ER-QP-4.5, Document Control
- LANL-ER-QP-3.2, Lessons Learned

4.0 DEFINITIONS

Note: A glossary of definitions is located on the ER Project internal homepage at <http://erinternal.lanl.gov/WritingGuide.shtml>

- 4.1 Effective date — The date that a controlled procedure is sent to the web for publication.
- 4.2 Record — By law, 44 USC 3301, “records” include all books, papers, maps, photographs, machine-readable materials, or other documentary materials, regardless of physical form or characteristics, made or received by the ER Project in connection with the transaction of business and preserved or appropriate for preservation by the ER Project or its legitimate successor as evidence of the organization, functions, policies, decisions, procedures, operations, or other activities of the ER Project or because of the informational value of data in them. (Ref. LANL LIR 308-00-02.0).

5.0 RESPONSIBLE PERSONNEL

The following personnel are responsible for activities identified in this DI.

- 5.1 Document Control Coordinator (DCC)
- 5.2 Supervisor

6.0 PROCEDURE

Note: ER Project personnel may produce paper copies of this desk instruction printed from the controlled-document electronic file located at http://erinternal.lanl.gov/home_links/Library_proc.shtml. However, personnel must utilize and train to the current version. Contact the author if text is unclear.

6.1 Format Electronic Record

- 6.1.1 The **DCC** creates form-fill forms, using each “Example” attachment in a procedure.
- 6.1.2 The **DCC** saves each form in “locked,” “read only,” .doc format.
- 6.1.3 The **DCC** reviews the document, ensuring that the appropriate document template/format is used (i.e., see QPs-4.1 and -4.2).
- 6.1.4 The **DCC** ensures that the author used current, webpage links.
- 6.1.5 The **DCC** inserts the “Effective Date,” (i.e., the date the procedure is sent for web publication) in the appropriate fields on the Title Page and in the Revision Log on page 2 of the procedure.
- 6.1.6 Using the “Reviewing” toolbar (i.e., right click mouse on toolbar area at top of screen and select “Reviewing” toolbar), the **DCC** selects “accept all changes in document.”
- 6.1.7 Selecting “Tools,” then “Compare and Merge Documents” on the Menu bar, the **DCC** compares the current document with the previous-revision, controlled file from the Quality, Document Control folder.
- 6.1.8 Using the “Reviewing” toolbar, the **DCC** chooses “accept” for all editorial changes, leaving content changes marked with a right-margin “sidebar,” ensuring that the electronic file is “saved as” a “read only” file.
- 6.1.9 The **DCC** creates a .pdf file using the final, sidebar-marked document file as follows:
 - Select “File,” “Print.”
 - Choose Acrobat PDFWriter as the printer under “Name:”
 - Select “OK.”
- 6.1.10 If the document is an ICN to a procedure, the **DCC** follows the process below:
 - 6.1.10.1 Save document .pdf file with “none” selected.

- 6.1.10.2 Acquire the controlled, original-revision file from the intranet, Quality, Document Control folder, saving as an “unprotected” .pdf file.
- 6.1.10.3 In Acrobat PDFWriter Insert the original revision file after the last ICN page.
- 6.1.11 The **DCC**, using the toolbar in Acrobat Writer, activates and sets each web link in the all types of .pdf files.
- 6.1.12 The **DCC** saves the .pdf file using “Saves As,” then under Security, select “Standard Control,” with “Do Not Allow” 1) “Changing the Document” and 2) “Adding or Changing Annotations and Form Fields” boxes checked.
- 6.1.13 The **DCC** ensures that all .doc files are in “Read Only” format.
- 6.1.14 The **DCC** creates a file folder in the Quality, Document Control folder, named with the procedure’s identification, e.g., QP-4.1, R4, or places an ICN in associated procedure’s folder.
- 6.1.15 The **DCC** copies all the .doc and .pdf files associated with the procedure into the appropriate Quality, Document Control folder.
- 6.1.16 The **DCC** updates the Master Controlled-Document List with pertinent information, as appropriate.
- 6.2 Perform Lessons Learned

During the performance of work, the **DCC** identifies, documents, and submits lessons learned, as appropriate, in accordance with QP-3.2, Lessons Learned, located at http://erinternal.lanl.gov/home_links/Library_proc.shtml.

7.0 RECORDS

No records are generated as a result of implementing a DI.

8.0 TRAINING

- 8.1 All users of this DI are trained by reading the desk instruction; documentation of training is not necessary.
- 8.2 The **supervisor** monitors the proper implementation of this procedure.

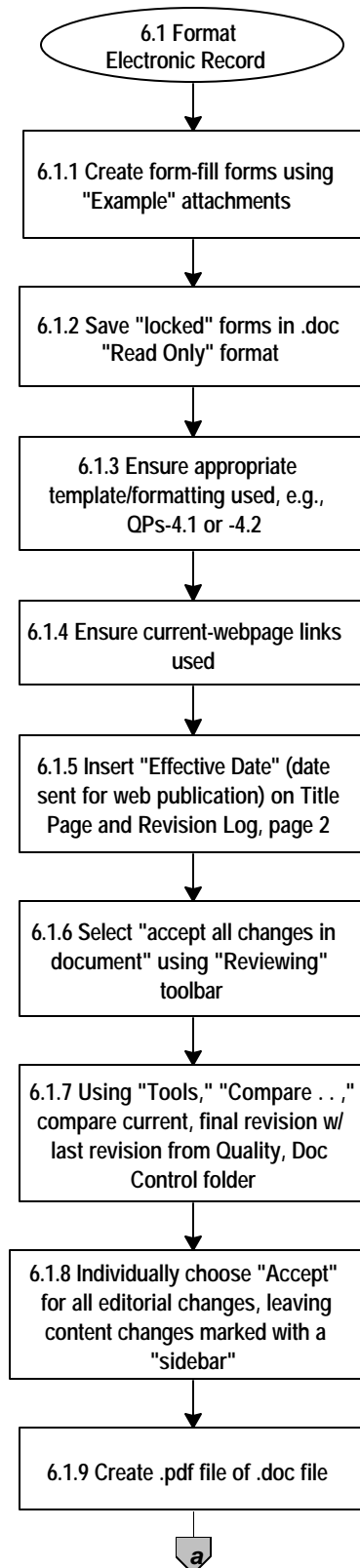
9.0 ATTACHMENTS

Attachment A: Formatting Electronic Records Process Flow Diagram (2 pages)

[Using a token card, click here to record "self-study" training to this procedure.](#)

If you do not possess a token card or encounter problems, contact the RRES-ECR training specialist.

Formatting Electronic Records Process Flow Diagram



Formatting Electronic Records Process Flow Diagram (Cont.)

